Linking Clients, Candidates & Jobs

From e.g. the main Clients page, you are able to link together Clients, Candidates and Jobs within your eBoss database.

*If you have previously created Linked events in your eBoss system, no need to do anything – your historical Linked Events will now simply appear in the new format.

Clients Linked Tab Overview

From the main Clients screen, click on the Client you wish to work with.

- Click on the Linked Tab
- Click on the Job Title bar(s) to view the Linked records for that Job. These can be opened and closed independently for ease of use.
- The column headings within the Job Panel reflect any customisations you have made to your LINKED OR XSTATUS PIPELINE (E.G. PRESCREEN, INTERVIEW, INTERVIEW 2, PLACED ETC)
- Hover over the Information icons for each Linked Status Item to view detailed information on the Job.
- Once the Job is Placed, you'll notice the 'chequered flag' icon to indicate this Vacancy has been filled.

Creating a New Link

- Click e.g. 'Interview 2' – you'll notice a green tick now appears in the box.
- The screen will automatically update with the relevant Status, Candidate, Client and Job pre-selected
- You may also send the Candidate and Client notification via email in the 'Notify Linked' panel below.
- Click the Add/Send button and the screen will automatically refresh to show you the status you have updated for that Job.

Jobs Linked Tab – Progressing Candidates

From the main Jobs page, you are now able to click on the blue icon in the Linked Column to take you to the main Linked page for that Job to quickly & easily progress your Candidates as required.

You may also click the ‘View All’ button from this Linked screen which will take you to the main Candidates page, automatically filtered for the Candidates linked to that Position to easily view their CVs and other documents, or use the Actions dropdown for mass communications such as Write email etc.